

Beyond the EHR: How Healthcare Leaders Scale with CRM

OCTOBER 23 | 11 AM CT



Thank you for joining us today! The Webinar will begin promptly at 11 AM CT.



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Webinar Housekeeping Items

Webinar Structure

- We'll start with a brief introduction and overview.
- Then move into the main presentation and live demo/discussion.
- We'll wrap up with an interactive Q&A session at the end.

Ask Questions & Engage

- Use the Chat / Q&A panel to submit your questions at any time — we'll address as many as possible during Q&A.

Audio Connection Options

- You can listen through your computer's mic and speakers or via telephone — whichever gives you the best audio experience.
- If you experience audio issues, try switching to the alternative method.

Quick Webinar Checklist Items

- ✓ This webinar is being recorded
- ✓ Recording available and sent within 48 hours
- ✓ Submit questions anytime via chat/Q&A panel
- ✓ Live Q&A at the end
- ✓ Unanswered questions will receive direct follow-up
- ✓ Please keep your line muted



Meet The Panel & Industry Experts



 **MODERATOR**

CHAD ANGUILM, MBA

*Vice President of Healthcare Delivery
and Operations, Provisions Group*



 **PANELIST**

MICHAEL JUSTICE

Chief Technology Officer, Viva Eve



 **PANELIST**

KAREN RAIMONDI

*Sr. Salesforce Consultant, Provisions
Group*



 **PANELIST**

TIM SINARD

*Salesforce Architect, Provisions
Group*



What We'll Cover Today

1. The EHR Reality Check

Why 2025 is the inflection point

2. Real-World Scenarios & Learnings

Michael Justice – Special Guest Speaker's Experience & Story

3. Highlighted Success Story

Mobile Healthcare Org Scaling From 1 state to 6 states

4. Technical Deep Dive

Common pitfalls and how to avoid them

5. Live Q&A

Your questions answered

6. Key Takeaways

Actionable Items for You to Get Started On



The EHR Reality Check

Healthcare organizations face an unprecedented challenge: while demand for services soars, operational inefficiencies cap growth at a fraction of market potential. There's a fundamental disconnect between clinical systems and operational platforms.

The Reality Check

44%

Less than half of clinicians feel their EHR meets integration expectations.

124%

Organizations modernizing their data infrastructure report 124% ROI.

71%

71% of physicians cite EHR usability as a major burnout driver.

25%

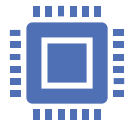
Integrated CRM / EHR systems see a 25% reduction in no-show rates.

Michael's 6 Major Pitfalls



1. Not defining requirements before buying

Define use cases before signing contracts



2. The "duct tape" approach

Using CRM to patch EHR problems = expensive'



3. The consultant problem

Multiple consultants + zero documentation = technical debt



4. Custom code without documentation

Future you will regret this



5. HIPAA compliance assumed, not verified

BAAs, access logs, Field security must be tested



6. UI and training neglected

Governance decays without ongoing attention



Karen's Real-World Success Story



Client: Fast-growing mobile wound care provider

Service Area: Home health facilities, multiple states

Challenge: Manual processes couldn't support growth

Solution: Salesforce FSL + IntelliCure integration

Result: 1 state → 6 states in 12 months

Tim's Critical Technical Considerations

- 1. Integration Architecture** - timing, frequency, volume, and orchestration
- 2. Data Interoperability Standards** - data structure variance
- 3. Patient Identity Matching** - Master Patient Index
- 4. Workflow Alignment** - order of operations, process dependencies
- 5. Data Collision Resolution** - establish an authoritative source
- 6. Error handling and monitoring** - logging, alerts, and retry mechanisms
- 7. Change and Lifecycle Management** - integrations are rarely "set-and-forget"

Live Q&A

Submit via chat or Q&A panel

Our panel will answer as many as time allows

Unanswered questions receive direct follow-up



Key Takeaways

1. Know What Each System Does Best

EHRs = billing/clinical | CRMs = acquisition/engagement
Don't force one to be the other

2. Integration Is Process Orchestration

Not just data movement | Changes daily workflows
Essential, not optional

3. Good Governance = Sustainable Systems

Define system of record | Document everything
Maintain training & governance

4. Patient Experience Depends on Integration

Relevant context | Proactive communication
Service failure tracking



Your Next Steps

1. Self-Audit

What are you forcing your EHR to do that it wasn't built for?

2. Define Your Specific Use Case

Don't say "we need efficiency" - get specific about problems to solve

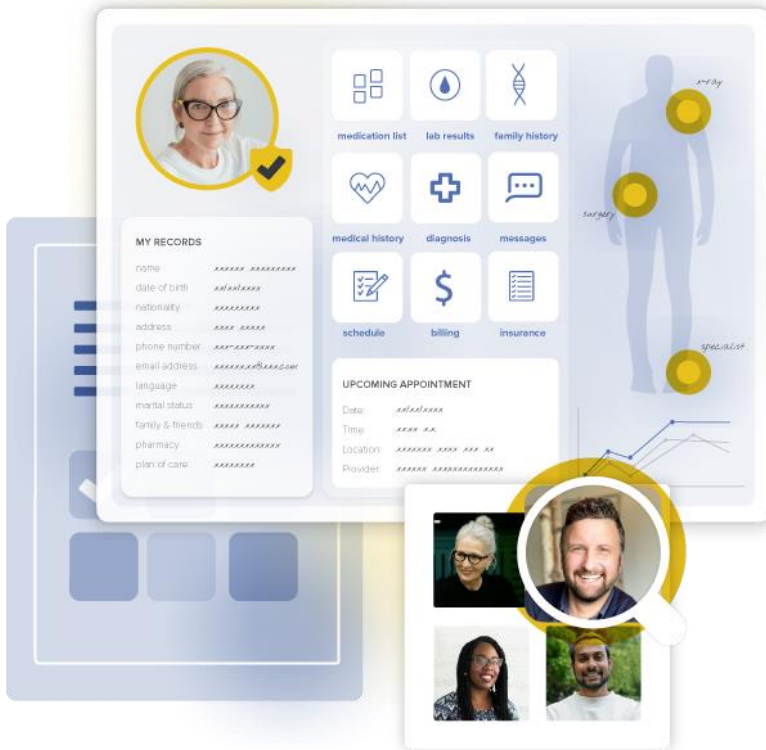
3. Evaluate Your Readiness

Budget for proper middleware & implementation?

Resources for documentation?

Commitment to change management & training?

Prepared to adjust workflows, not just add technology?



How Provisions Group Can Help

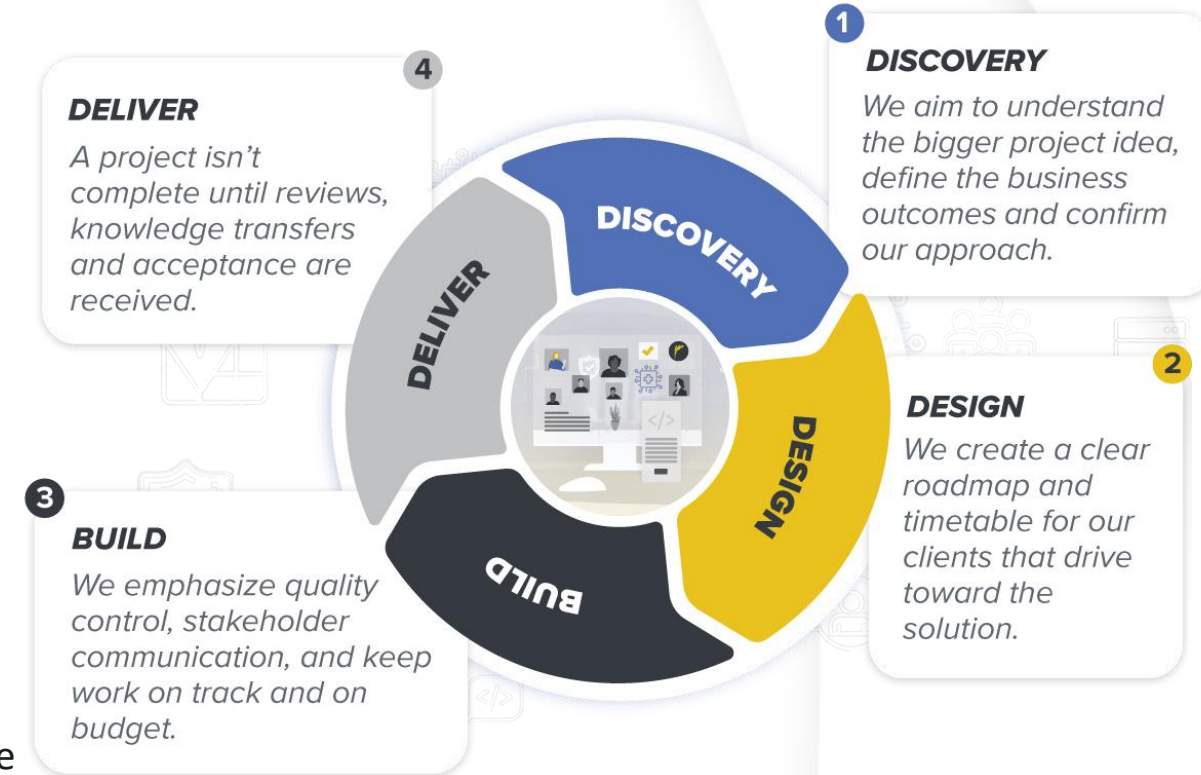
Platform-Agnostic Healthcare Integration Experts

Our Approach:

- **Discovery First**
Audit existing processes before recommending technology
- **Architecture**
Design full integration stack, not point solutions
- **Implementation**
Build it right, with documentation and testing
- **Change Management**
Train your team and ensure adoption

We work with: Salesforce | HubSpot | Microsoft Dynamics | And More

We're your "phone a friend" as you navigate this journey



Thank You!

Chad Anguilm

VP of Healthcare Delivery & Operations

Provisions Group

<https://www.linkedin.com/in/chadanguilm>

chad@provisionsgroup.com

Michael Justice

Chief Technology Officer

Viva Eve

mjustice@vivaeve.com

<https://www.linkedin.com/in/mgjustice/>

Karen Raimondi

Sr. Salesforce Consultant

Provisions Group

<https://www.linkedin.com/in/karen-raimondi/>

karen.raimondi@provisionsgroup.com

Tim Sinard

Dev Team Manager & Sr. Salesforce Architect

Provisions Group

<https://www.linkedin.com/in/timothy-sinard-1127763a/>

tim.sinard@provisionsgroup.com

